Purchase to Pay

Create or Update Supplier Information via Coupa Supplier Portal (Suppliers)

As of MARCH 2019

Overview

Suppliers can create or update contact and payment information for transacting with ENGIE via two methods:

- *Provide information via email using a one-time link*
- *Registering on the **Coupa Supplier Portal (CSP)** and completing the requested profile information*

The CSP is a free tool that allows suppliers to do business with customers with the ability to acknowledge purchase orders, submit invoices, and maintain contact/payment information in real time.

Objective

This job aid describes the process on how to create or update your supplier information using the Coupa Supplier Portal (CSP).

Steps to Create/Update Supplier Data in CSP:

If you are a new vendor doing business with ENGIE, or if you are an existing vendor needing to update your contact/payment information, Engie procurement will send you and e-mail from within Coupa to Coupa to update your information. In this email, there will be a link to join and register for the CSP to update your information. **Click ' Join and Respond' to begin.**

coupa Request for Information from ENGIE North America

Dear Valued Supplier,
ENGIE North America would like to conduct business with you through Coupa, our online procurement tool. In order to provide timely payments, Engie wants to ensure that your profile is valid and up to date.
To get started, please submit your complete company information. You can do this in two ways (see instructions at end of email):

1. You can do a one-time registration; or,
2. You can register directly through the Coupa Supplier Portal (CSP) free-of-charge.

We highly recommend registering through the CSP as it provides the following benefits:

- Self-maintenance of company and payment information
- Viewing and acknowledging your purchase order
- Creating electronic invoices and credit notes
- Visibility to invoice approval status and payment details
- Ability to have multiple users in your account to track the activity and complete necessary procurement and invoicing actions

The options for submitting invoices to ENGIE are as follows:

- Via the CSP – please click here for a demonstration on how to submit via the CSP
- Via email – please see how-to video here
- Via direct email – invoices@engiena.coupahost.com . Please make sure you include the PO # written on it

When submitting your information, please provide a Federal Tax ID and ACH banking information. Please ensure that the form is submitted with all required data. If the form is incomplete, it will be returned to this email address for resubmission.
Most Common reasons why a new vendor form is rejected:
1.- For US vendors: 10 digits zip code: the form requires to enter a 10 digits zip code in the "Remit to address" and "Primary Address", if you do not know your complete zip code you can find it here: https://m.usps.com/m/ZipLookupAction?search=address

2.- W9 or W8B out of date: the form requires to enter a W9 or W8B signed in the last 12 months.

Please click on the first link to begin registration without signing up for the Coupa Portal
Please click on the second link to begin registration for the Coupa Portal.

...

Join and Respond | Respond Without Joining

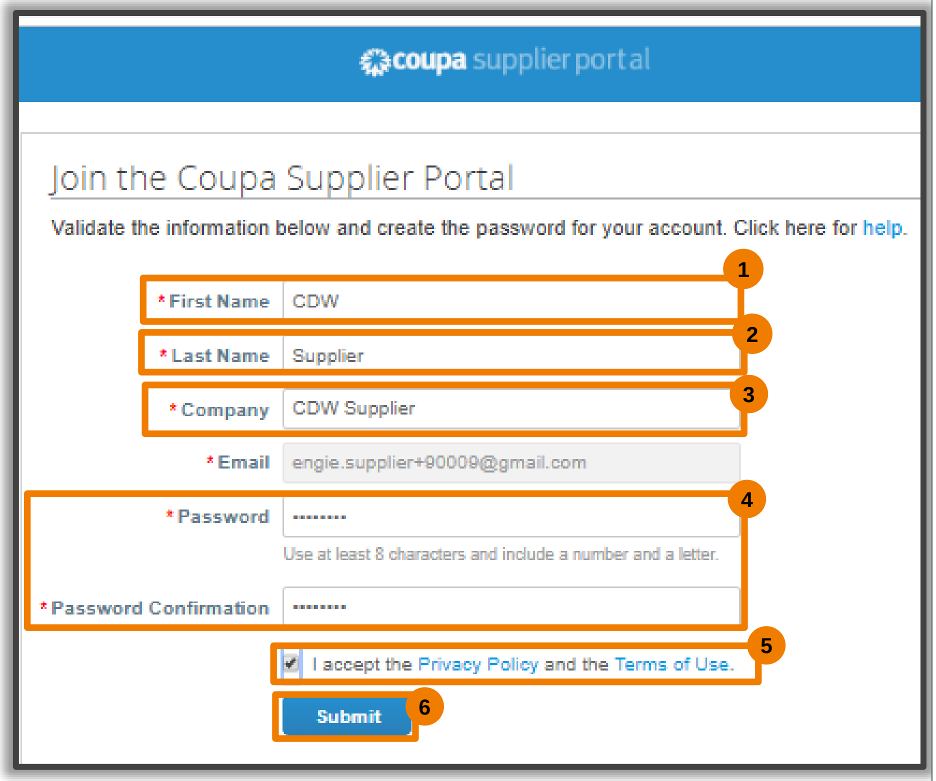
Join Coupa Supplier Portal

A register to CSP portal screen is displayed. Register and Login to the CSP by creating an account.

1. *Enter first name in the **First Name** field.*
2. *Enter last name in the **Last Name** field.*

Note: Additional users can be added after registering for the portal.

3. *Enter company name in the **Company** field.*
4. *Enter and confirm a password in the **Password** and **Password Confirmation** field.*
5. *Select the **I accept the Privacy Policy and the Terms of Use** checkbox.*
6. *Click the **Submit** button.*



Welcome Screen

The Welcome to the New Coupa Supplier Portal screen is displayed.

7. *Click the **Skip** or **Close** button.*

Coupa supplier portal home page

8 *Click the **Profile** tab to update contact/payment information.*

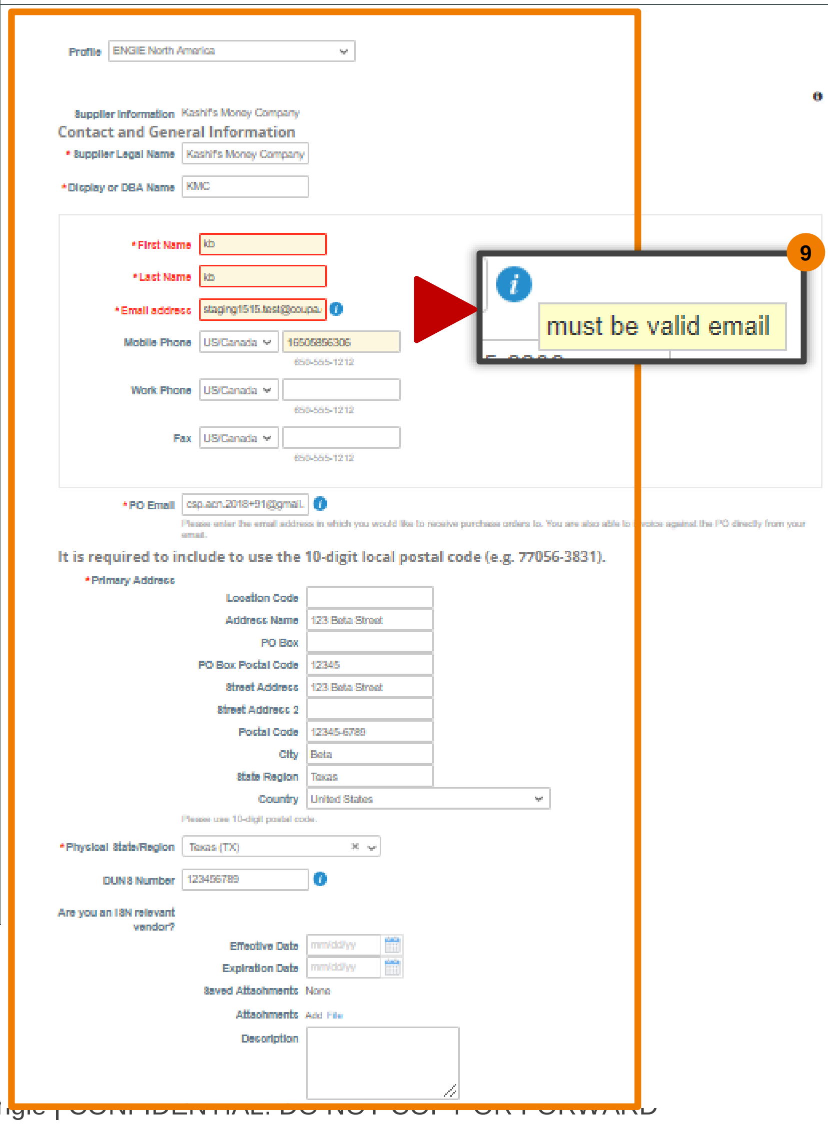
Note: You may be directed straight to your profile section if ENGIE has requested this information.

Note: The Profile tab is the only place where updates to contact, remittance, and payment information will be acknowledged. Any changes completed in the Admin tab will not be sent to ENGIE.

Profile Screen

9 *Populate the mandatory fields (any field with red asterisk *)*

- ***Supplier Legal Name***
- ***Display or DBA Name***
- ***Physical Address:** For postal codes, please refer to hints in form for country-specific format requirements. **(10-digit zip required for US postal codes)***
- ***Physical Address State/Region***
- ***Primary Contact***
- ***PO Email:** this email address will receive PO email notifications*
- ***DUNS Number***
- ***Are you an ISN relevant vendor?***



Note: Hover over the blue "*i*" icon for direction on character limitations for specific fields. These character count requirements must be met to submit forms.

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10 *Scroll-down and populate the following mandatory fields:*

- ***U.S. Tax ID:** must be a valid federal tax ID, SSN should <u>not</u> be used*
- ***Business Classification***
- ***Account Currency***
- ***U.S. Federal Tax Form***

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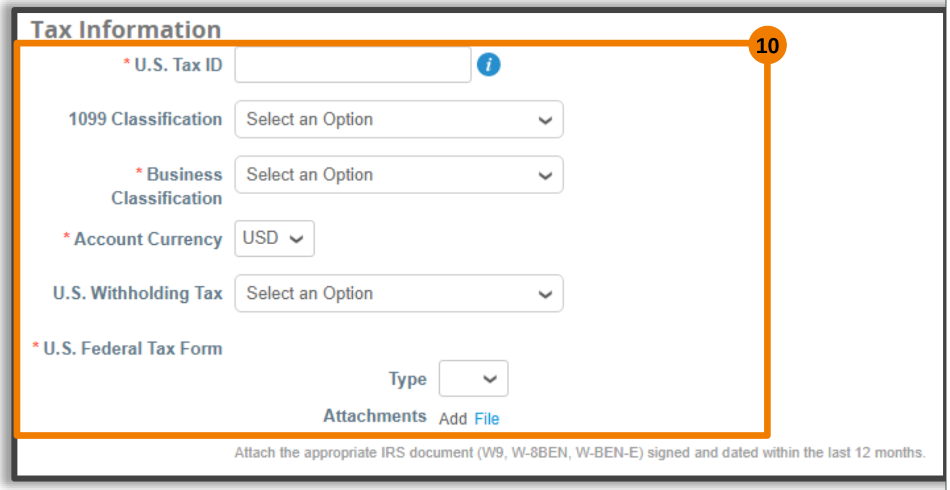

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11 *Scroll-down to populate the following fields, if applicable:*

- ***Minority and Small Business Information***

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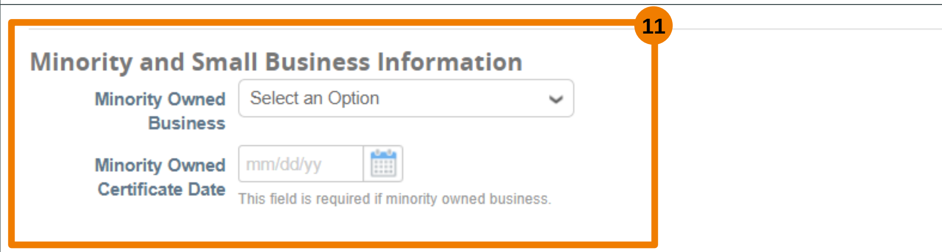

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12 *Scroll-down to populate the mandatory fields*

- ***Remittance Advice Email:** This will be the email where payment notifications will be sent*
- ***Pay Method:** ACH or Wire Transfer*

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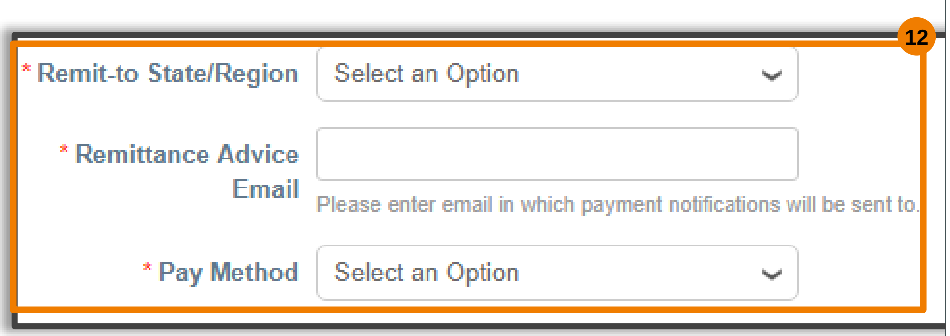

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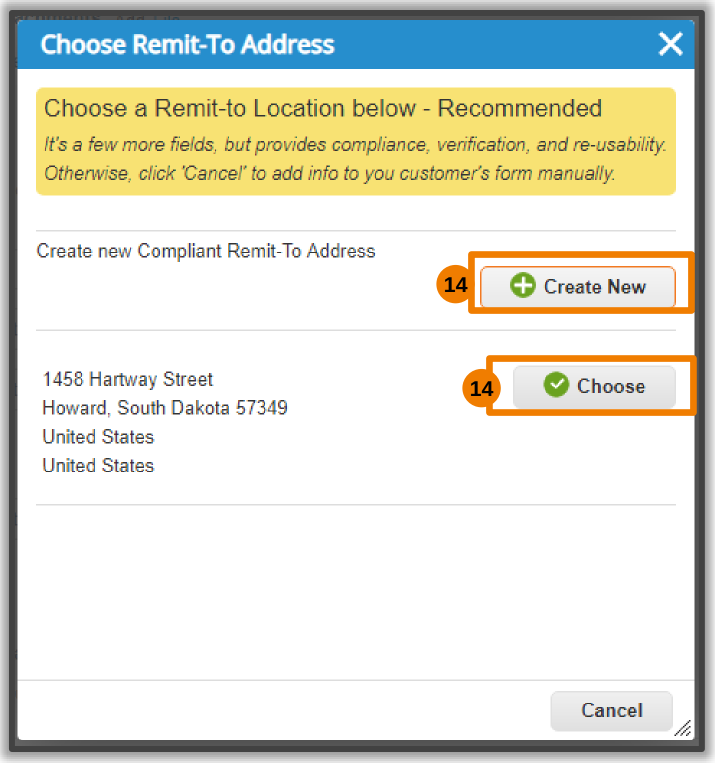
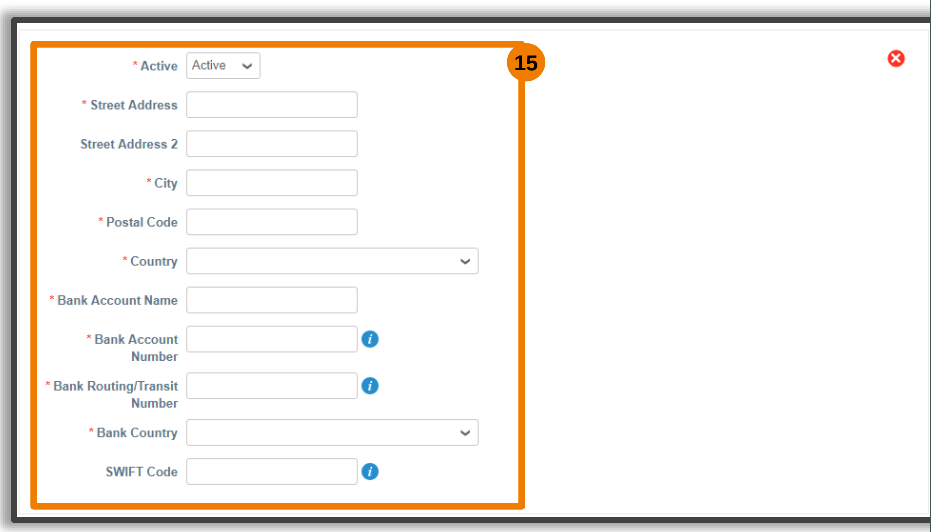
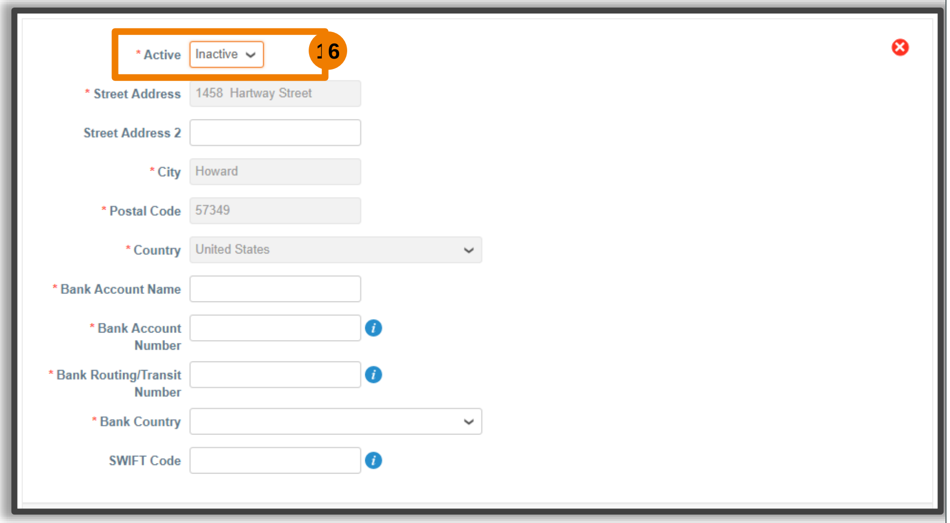
13 *Scroll-down to the* ***Remit-To Address Lines*** *section and click the* ***Add*** *button to add the Remit-To address.*	
Choose Remit-To Address window *The* ***Choose Remit-To Address*** *pop-up is displayed. You can select from the two options.* **14** *Click the* ***Create New*** *button to create a new Remit-To address* *OR* *Click* ***Choose*** *to update the existing Remit to Address.* ***Note:*** Only one active remit-to address / banking info is allowed. If you need to update an existing remit-to address, please inactivate the current remit-to and add a new active field.	
15 *If the* ***Create New*** *button is selected, populate the following mandatory fields:* • ***Active*** • ***Street Address*** • ***City*** • ***Postal Code*** • ***Country*** • ***Bank Account Name*** • ***Bank Account Number*** • ***Bank Routing/Transit Number*** • ***Bank Country***	

16 *If the **Choose** button is selected, change the status of the existing remit to address to Inactive*

- ***Active:** Set to Inactive*

Then refer to Step 15 to create a new remit to address.



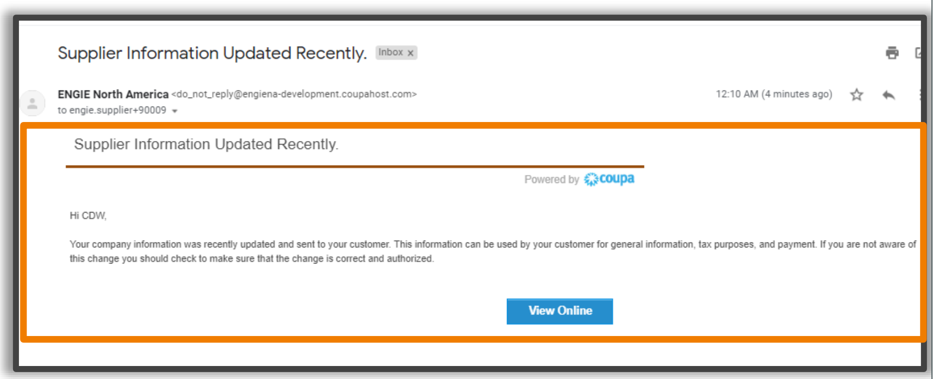
17 *Click the **Submit for Approval** button.*

Supplier Data created or updated

A success message stating that the information is successfully submitted is displayed.

Confirmation Email

Once the information has been submitted, the supplier will receive an email notification confirming the information has been updated.



Notes for Canada based Suppliers

The same process is also carried out for a Canada supplier.

The New Supplier Request Form is slightly different for a Canada Supplier. Please follow the instruction in the hints below each tax field on format for entry.

The following fields are unique to the Canada supplier:

- ***CAN: GST/HST No.***
- ***CAN: BC Provincial Sales Tax (PST) No.***
- ***CAN: MB Provincial Sales Tax (PST) No.***
- ***CAN: Quebec Sales Tax (QST) No.***
- ***CAN: SK Provincial Sales Tax (PST)***
- ***Canada Withholding Tax***